# Free and Reduced Price Eligibility System Software v.2001
# USER INSTRUCTIONS

# INTRODUCTION

**Before using these instructions, ensure that the Free and Reduced Eligibility software is correctly installed and set up on your computer.  You can access download/setup instructions at:**
**https://kyeascn1.state.ky.us/nutrution/reporting.asp**

**If you wish to network this software, please contact Kelley Marston at 502-564-5625 or by e-mail at**
**kmarston@kde.state.ky.us**

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**You will find SYSTEM WARNINGS marked with an ⊠ throughout this manual.  These warnings describe system compliance issues or warning regarding data input.**

⊠  **If you don't see Elig2000 in your Programs menu, the Free and Reduced Price Eligibility System software is not properly installed. Refer to the download/setup instructions referenced above.**

⊠  **The Eligibility System software will only allow data entry from July 1 until November 15.**

⊠  **You may only convert existing data into the system once.  If you need to reinstall the converted data, you must begin with a fresh install of the Eligibility System.**

⊠  **Deletions performed in any area of the Eligibility System are NOT RECOVERABLE.**

⊠  **Minus signs are not permitted in any numeric fields.**

⊠  **When entering prices, enter as 1.25 , .70,  .95, etc.**

⊠  **Enter Y2K compliant dates (e.g., 08/30/1999) in all data fields.**

⊠  **When entering income information, do not include any commas, decimals, etc. , and  ALWAYS use whole dollar amounts.**

# OPENING THE NEW ELIGIBILITY SYSTEM FOR THE FIRST TIME

During setup, a shortcut to Elig2000 was installed in your computer's Start Menu.
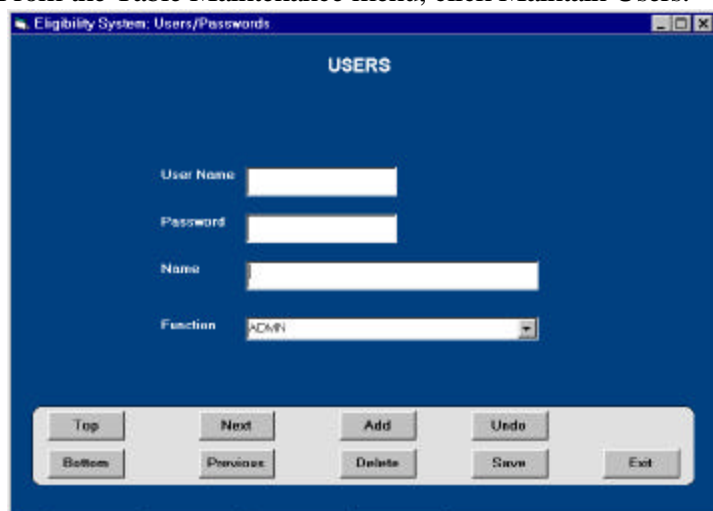
**To access the system:**

1. Click the Start button.
2. Move your mouse over Programs.
3. Click Elig2000. If you do not see Elig2000 in the Programs menu, the Eligibility System software is not installed correctly.  Please refer to the **download/setup Instructions**.
4. Leave both the User Name and Password fields of the Get Password screen blank the first time you sign on and click OK to advance to the Main Menu.
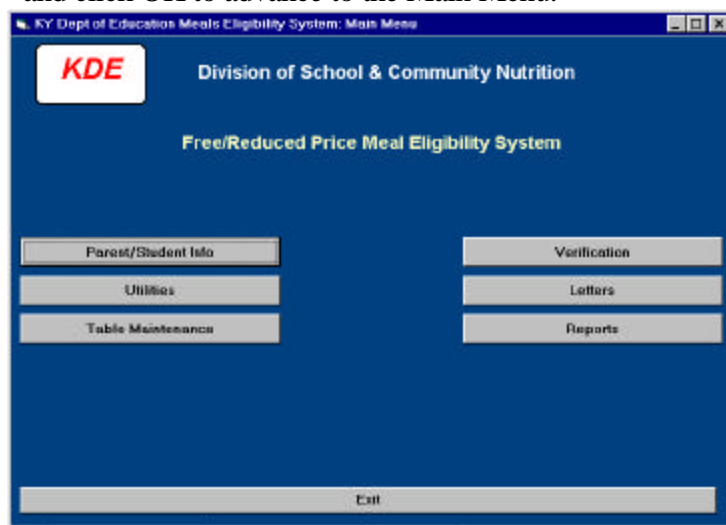
2. From the Main Menu, click Table Maintenance.
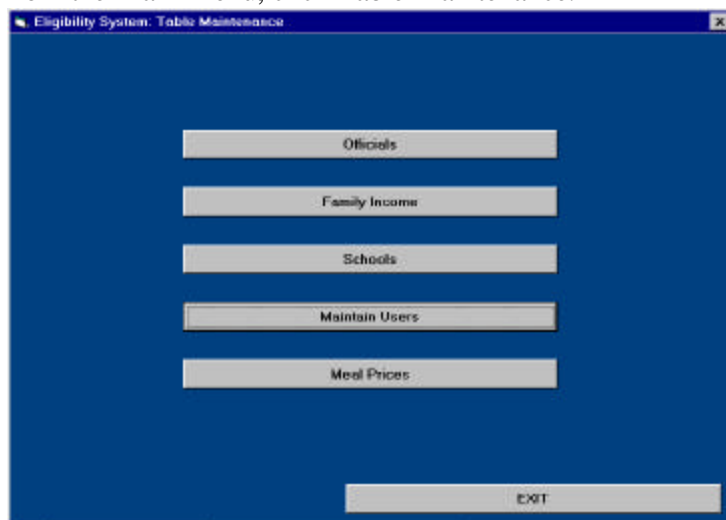
3. From the Table Maintenance menu, click Maintain Users.



4. Enter a User Name for the school food service director in the User Name field (User Name can be no more than 8 characters).
5. Press the Tab key to move to the next field and enter a Password (Password can be no more than 8 characters).
6. Press the Tab key to move to the next field and enter the user's full name in the Name field.
7. Make sure that ADMN appears in the Function pull-down menu.

☒ **SYSTEM WARNING:** **The first user added MUST BE the school food service director and MUST SHOW ADMN as the function. If the first user entered is not given ADMN function, no one will be able to access certain parts of the system. Users with ADMN functions have access to all system areas. Users with USER functions are denied access to system functions of an administrative nature such as user maintenance, family income changes, etc.**

8. When the information is correct, click the Save button.
9. When prompted to save your changes, click Yes.
10. Click the Exit button to return to the Table Maintenance menu. (Each user that is entered will be required to provide their password each time they log in.) Administrators may want to keep a private list of all assigned passwords and user names.
11. Click the Exit button to return to the Main Menu.

**NOTE:** The Top, Bottom, Next, and Previous buttons allow you to move through the user list you are creating (see Table Maintenance). You may wish to continue adding users by clicking the Add button and repeating the steps listed above.

☒ **SYSTEM WARNING**: **If you try to enter a duplicate user, you will receive an error screen stating that the record already exists. Click OK and revise information or check for duplications.**

? **PREVIOUS USERS:** If you **HAVE USED A PRIOR VERSION** of the Eligibility System and can locate your database files (default was a folder titled Eligwin on the C: drive), proceed to the following instructions for Converting Existing Data.

? **NEW USERS:** If you **HAVE NOT USED A PRIOR VERSION** of the Eligibility System, or wish to enter all data new, skip the section on Converting Existing Data and continue to the Table Maintenance instructions. You will not be able to use the Convert Existing Data function because you have no prior data stored to import into the system.
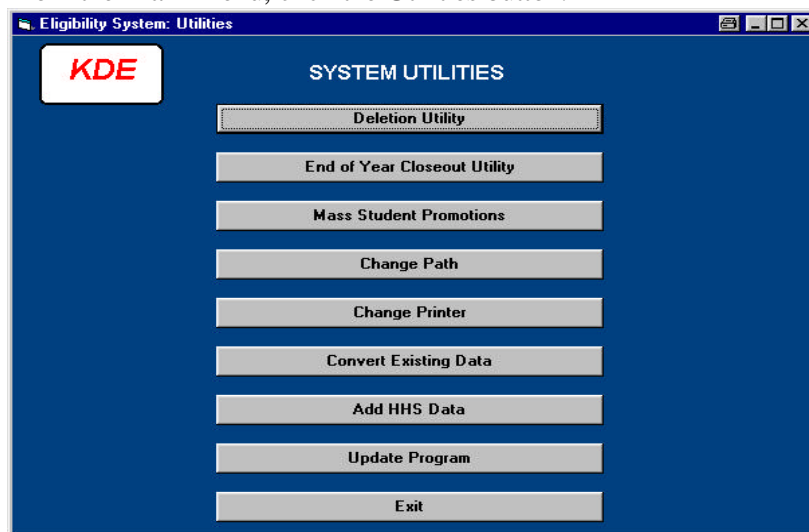
# CONVERTING EXISTING DATA

Use this utility if you have data files from an older version of the Eligibility System software (installed prior to 1998) that you want to import into the new system.  Before converting or entering data, be sure you have set up at least one ADMN user (see Opening the Eligibility System for the First Time). Data MUST BE copied into a newly set-up system.

☒ **SYSTEM WARNING: You may only convert existing into the system once.  If you need to reinstall the converted data, you must delete the existing version of the software and reinstall a new version of the software before reconverting the data.**

☒ **SYSTEM WARNING: After conversion, you must ensure that all Table Maintenance instructions are completed or the system may not work correctly. Meal Prices from older versions of the Eligibility System are not converted.  You will need to complete these fields from the appropriate Table Maintenance area.  In addition, fields that were not included in the older version of the system will appear as blank fields in the new system.**

**To convert data from a previous version:**

1.  From the Main Menu, click the Utilities button.



2.  Click the Convert Existing Data button.
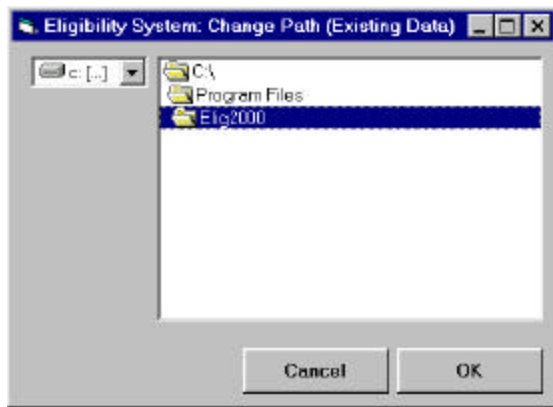
3. Using the pull-down menu on the left, choose the drive on your computer where the old version files are stored (usually the C: drive).
4. Double-click on the drive (C:\) in the right menu and locate last year's storage folder in the folder list. **NOTE: If the defaults were accepted when the older system was installed, the files should be stored in the eligwin folder on the C:\ drive.**
5. Double-click on the storage folder (Eligwin) that contains the old year files (the folder should appear open).
6. Click OK. Your old files will be converted. This may take a few moments depending on the size of your database. While the data is being converted, you will see an hourglass.

7. When the conversion is complete, click OK.
8. Click Exit to return to the Main Menu.
9. Continue to the Table Maintenance instructions.

# TABLE MAINTENANCE

Ensure that you have at least one ADMN user set up on the system before completing Table Maintenance. Before the system will function properly, **YOU MUST ENSURE THAT ALL ITEMS IN TABLE MAINTENANCE HAVE BEEN COMPLETED.  Meal Prices are not converted from old year data.**

1.  From the Main Menu, click the Table Maintenance button.

## OFFICIALS

You must enter information about the district and designated officials in the five areas listed in the Select Official box at the bottom of this form. **NOTE:  If you do not use the Save button on each form, your data will not be stored.**

1.  From the Table Maintenance Menu, click the Officials button.

**District Info**

2. Click the round radio box next to District Info.
3. Using the Tab key to move through the fields, enter the District Name, Address, City, State, Zip Code, and Phone Number.
4. Click the Save button.

**Appeal Official**

5. Click on the Appeal Official radio button.
6.  Using the Tab key to move through the fields, enter the Appeal Official's Name, Address, City, State, Zip Code, Phone Number and Title.
7. Click the Save button.

**Determining Official**

8. Click on the Determining Official radio button.
9. Using the Tab key to move through the fields, enter the Determining Official's Name, Address, City, State, Zip Code, Phone Number and Title.
10. Click the Save button.

**Hearing Official**

11. Click on the Hearing Official radio button.
12. Using the Tab key to move through the fields, enter the Hearing Official's Name, Address, City, State, Zip Code, Phone Number and Title.
13. Click the Save button.

**Verification Official**

14. Click on the Verification Official radio button.
15. Using the Tab key to move through the fields, enter the Verification Official's Name, Address, City, State, Zip Code, Phone Number and Title.
16. Click the Save button.
17. When each Official field has been completed and saved, click the Exit button to return to the Table Maintenance menu.

# FAMILY INCOME

Eligibility guidelines are received each year from USDA.  **NOTE:  All income must be entered as a monthly figure.**

**Adding/Editing Family Income Table**

1. From the Table Maintenance menu, click Family Income. You can use your arrow keys on your keyboard to move through the fields in the Family Income Information table.

2. Click inside the first blank cell and enter the lowest family size.
3. Click in the Free Limit cell and enter the monthly Free Meal eligibility amount for that family size.
4. Click in the Reduced Limit cell and enter the monthly Reduced Meal eligibility amount for that family size.
5. Continue entering the remainder of the family sizes an incomes as required by your district.   As you enter a row, a new row will be added.
6. Use the arrow keys on your keyboard to move around the fields in this income chart.
7. Your changes will be saved when you Exit.
8. When you have completed all needed family sizes and income information, click the Exit button to return to the Table Maintenance menu.

**NOTE**:  Because USDA information only publishes calculations up to a family of 8, if you require guidelines for larger family units, you will need to add larger family units by the additional family member amount listed in the USDA guidelines.

## SCHOOLS

When entering schools into the Eligibility system, it is a good idea to add a "fake" school number in addition to your district's assigned schools to provide a holding area for students who transfer out of the system to another district so that the record can be retained.

If you converted data from an earlier version, you can view your school information using the Top, Bottom, Previous and Next buttons.

## Adding a School

1. From the Table Maintenance menu, click the Schools button.

2. Click the Add button to clear the fields.
3. Click the mouse in the School Number box and type the school's 3-digit School Number.
4. Press the Tab key and enter the School Name.
5. Use the pull-down menu to select the School Code (Elementary, Middle or High School).
6. Click Save. You MUST CLICK SAVE AFTER ENTERING EACH SCHOOL, or your data will not be stored.
7. When prompted to save your changes, click Yes.
8. To add another school, click the Add button and complete steps listed above until each school has been entered into the system.
9. When all schools have been entered, click the Exit button to return to the Table Maintenance menu.

## Deleting a School ☒ SYSTEM WARNING:  DELETIONS ARE NOT RECOVERABLE.

1. From the Table Maintenance area, click Schools and locate the school you wish to delete using the Top, Bottom, Next or Previous buttons.
2. Click the delete button.
3. Click Yes in the Delete Confirm box.



## MAINTAIN USERS

In order to ensure that data is not accessed by unauthorized individuals, you should set up a security status of either ADMN or USER for each employee who requires access to the system.

☒ SYSTEM WARNING: If an Administrator is not entered first, all users will be locked out of most areas of the system! (See Opening the Eligibility for the First Time.)

☒ SYSTEM WARNING: User Names and Passwords cannot be more than 8 characters.

## Adding Users

1. From the Table Maintenance menu, click the Maintain Users button.

2. Click the Add button to clear the fields.
3. Enter a User Name.
4. Press the Tab key and enter a Password.
5. Press the Tab key and enter the employee's Name.
6. Using the pull-down menu, enter the status of the user (ADMN for full access -- USER for limited access).

☒ **SYSTEM WARNING: Do not exit the application from the Main Menu unless at least one ADMN user has been assigned or you will be locked out of certain areas of the system, and the software will have to be reinstalled.**

7. Click Save. If you do not click Save after entering each user, your data will not be stored.
8. When you are prompted to save your changes, click Yes.
9. To Add another user, click the Add button and repeat the steps above until all authorized employees have been assigned a user name, password and status.
10. When all employees have been entered and saved, click the Exit button to return to the Table Maintenance menu.

## Deleting Users     ☒ **SYSTEM WARNING: Deletions are not recoverable! Be sure you do not delete your ONLY ADMN ACCOUNT! This will result in loss of access to the system.**

1. From the Table Maintenance menu, click Maintain Users and locate the user you want to delete using the Top, Bottom, Next or Prev buttons.

2.  Click the Delete button
3.  When prompted with "Do you want to DELETE this record, click Yes.

## MEAL PRICES

☒ **SYSTEM WARNING:  Meal Prices are not converted with the Convert Existing Data Utility.**

**NOTE:**  You must enter all amounts in decimal format (i.e., 1.00, .70, .95, etc).

1.  From the Table Maintenance menu, click Meal Prices.    The radio check boxes at the bottom in Select School Type will indicate the prices you are entering into the system.



2.  With the Elementary radio check box selected, use the Tab key to advance through fields, completing the pricing information for Full Price Breakfast, Reduced Price Breakfast, Full Price Lunch, and Reduced Price Lunch for Elementary Schools.
3.  Click Save.
4.  Click on the Middle radio button.
5.  Using the Tab key to advance through fields, complete pricing information for Middle Schools.
6.  Click Save.
7.  Click on the High radio button.
8.  Using the Tab key to advance through fields, complete pricing information for High Schools.
9.  Click Save.
10. When you have completed and saved pricing information for each type of school in your district, click the Exit button to return to the Table Maintenance menu.
11. Click the Exit button again to return to the Main Menu.

# PARENT/STUDENT INFORMATION

The Parent/Student Info area allows administrators to add, update, delete and view both student and parent records.

☒ **SYSTEM WARNING:** **The parent records should be entered first, and the system will prompt you at the appropriate time to enter students. DO NOT ADD STUDENTS FIRST because a parent number will not be assigned and the system may not work properly.**

☒ **SYSTEM WARNING:** **Deleting a parent file also deletes all attached students. DELETIONS ARE NOT RECOVERABLE.**

**NOTE: AFTER ADDING OR UPDATING PARENT/STUDENT INFO, YOU MUST PERFORM CALCULATIONS ON STUDENTS (see instructions on Performing Calcs on Students).**

## ADD/EDIT PARENT INFO

## Adding a Parent File

**NOTE**: This system automatically assigns Parent ID numbers for each subsequent parent added.

1. From the Main Menu, click Parent/Student Info.
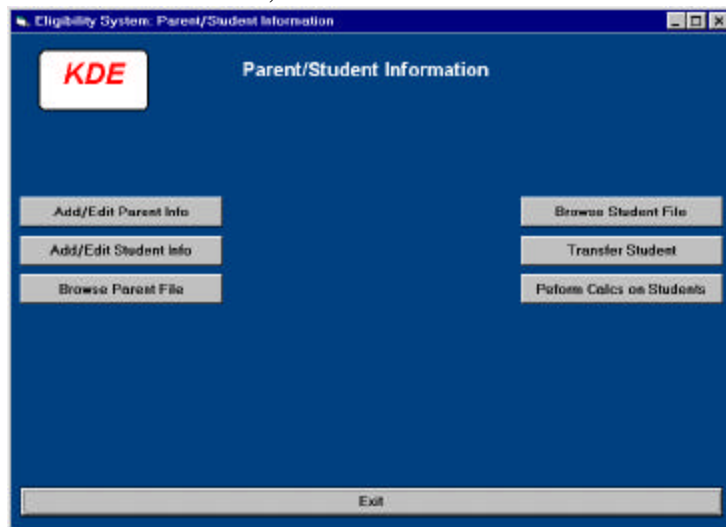
2. Click the Add/Edit Parent Info button.



3. Click the Add button to clear the fields.
4. Using the Tab key to move through the fields, enter Last Name, First Name, Address, City, State, Zip Code, Phone numbers, and Social Security Number. **NOTE:** If the application indicates that they have no Social Security number, click on the No SSN button. This will allow the application to be approved without a Social Security number provided no other errors are present.
5. Enter number of persons residing in household in box titled HH Size.
6. Enter the Food Stamp or K-TAP # (K-TAP # preferred) of parent who has signed the application or head of household.
7. Click the Signature checkbox to verify that a valid signature was present on the application.
8. Click to check the Food Stamps box if household receives food stamps.
9. Click to check the Direct Certify box if you use Direct Certification to assign eligibility.
10. Click to check the K-CHIP box if household participates in K-CHIP.
11. Click in the Source field of the Income Information area and enter any sources and amounts of income. NOTE: All income must be listed as a monthly amount.
12. Click the Save button. If you do not click Save, your data will not be stored.



13. Click Yes.



14. Click Yes to attach a student to the parent record you have created.

☒ **SYSTEM WARNING**: **If a duplicate Social Security Number (SSN) is entered, you will receive a warning message and the record will not be saved.**

# ADD/EDIT STUDENT INFORMATION



## Adding a Student File

☒ **SYSTEM WARNING:** **You should reach this screen after completing a Parent Information record so that a parent ID number can be assigned to the record. Trying to add students without a parent record already in place will result in system errors. The Add/Edit Student Info button should only be used to correct the student record – not for creating a student file.**

1. From the Student Information screen, click the Add button to clear the fields.
2. Make sure the correct parent appears in the Parent ID pull-down menu. The parent is identified by Parent ID number, Name and Social Security Number.



3. Enter student's Last Name and First Name. The parent's Social Security Number appears in the SSN field.
4. Use the pull-down menu to select the student's Race.
5. Enter Homeroom identifier.
6. Use the pull-down menu to enter the school's 3-digit School No.
7. Use the pull-down menu to select the student's Grade.
8. The Entry Date, Eligibility and Denial Reason fields are generated by the computer when student calculations

are done and records are processed. Entries are not accessible from this screen.

9. If student is to be given a meal ticket, enter Ticket Number.
10. The Withdraw Date, Transfer Date, X-fer Loc and X-fer Info fields are used to track students entered through the Student Transfer button on the Parent/Student Info screen. These fields are generated by the computer when student calculations are done and records are processed. Entries are not accessible from this screen.
11. If student is in foster care, click to check the Foster box.
12. The Verified check box, Verify Date and Verify Result fields will not be completed until you have run the verification report. After verification, the information is generated by the computer.
12. Enter the student's K-Tap number, if applicable.
13. Enter the date that the record becomes effective in the Effective Date box.
14. Click the Save button.
15. Click Yes.
16. If you wish to enter another student, click the Add button and complete steps above until all students attached to this parent have been added.
17. To enter another family, after your student information is saved, click the Parent button to return to the Parent Add area and click Add to clear the parent fields.

## Editing a Parent File

1. From the Main Menu, click the Parent/Student Info button.
2. Click Add/Edit Parent Info
3. Click the Find button.
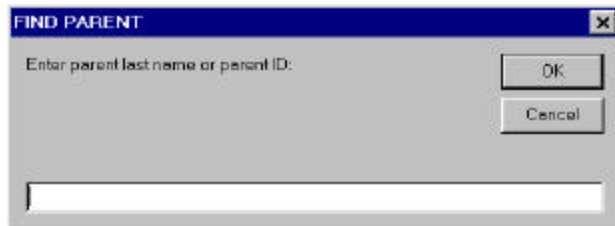


4. Type parent's last name or parent ID to receive one of the following messages.
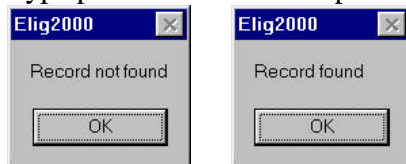


5. Click OK. If a record has been found it will be displayed in the Parent Information screen.

**More Navigation:**

? **To locate other students attached to a parent record, click the Browse Students button.**
? **While a parent record is open, you can delete it by clicking the Delete button.** ☒ **SYSTEM WARNING: DELETIONS ARE NOT RECOVERABLE.**
? **Click the Top button to go to the top of the parent list.**
? **Click the End button to go to the bottom of the parent list.**
? **Click the Prv button to see the preceding parent file.**
? **Click the  Nxt button to see the  next parent file.**
? **Be sure to Save EACH RECORD you make changes to.**

## BROWSE PARENT FILE

1. From the Table Maintenance menu, click Parent/Student Info.
2. Click Browse Parent File.
3. Click on a button in the Sort By area to view parents by Parent ID, Last Name or Social Security Number.

As your list grows, you will see scroll bars appear which allow you to view the list.

## BROWSE STUDENT FILE

1. From the Table Maintenance menu, click Parent/Student Info.
2. Click Browse Student File.
3. Click on a button in the Sort By area to view students in order by Last Name, Student ID, School # or Eligibility.

As your list grows, you will see scroll bars appear which allow you to view the list.

## TRANSFER STUDENT

This area is used to track withdrawal and transfer information for the Notification of Transfer document that is used for documentation purposes. The transfer information is automatically updated on the Student Info record as the data on the screen is saved. **NOTE:  It is a good idea to set up a fake school number using the Table Maintenance area so that a record of the students moving out of district can be saved.**

If a student transfers out of the district, the corresponding parent files should be deleted unless the same parent has other children attending schools in your district.  Districts should prepare two copies of the district's Notification of Transfer document so that one copy can be mailed to the transfer location and one copy can remain with the withdrawal location.   New information, such as school number, teacher, grade or other student information must still be updated on the Student screens.

1. From the parent/Student Information menu, click Transfer Student.



2. In the Withdrawal Info box, use the pull-down menu to select the Student ID.
3. Enter Date of withdrawal.
4. Use the pull-down menu to select the School ID of the school the student is transferring/withdrawing FROM.
5. If the student is transferring to another school within the district, enter the Date of transfer in the Transfer Info area.
6. Use the pull-down menu to select the School ID of the school the student is transferring TO. **NOTE: It is a good idea to set up a fake school number using the Table Maintenance area so that a record of the students moving out of district can be saved.**
7. Use the notes field to enter any additional information regarding the student's transfer or withdrawal.
8. When the information is complete, click the Xfer button. A Notification of Transfer will appear in the report area.



From the report screen, you can use the button bar at the bottom to:

 View the report in full-screen mode.

 Print a copy

 Use the Export Utility to save a file to disk.

 Close button to exit.

# PERFORM CALCS ON STUDENTS

If you try to exit the Eligibility System with unprocessed records, you will be prompted to process them so that they can be saved to the permanent file. Depending on the size of your database, it may take some time to perform these calculations.  You should perform calculations after adding or editing information.  Calculations must be performed before your reports will display the correct verification status.

1.  From the Student/Parent Info menu, click Perform Calcs on Students.
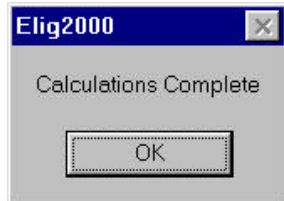


2.  Click OK.
3.  Click Exit to return to the Main Menu.

# UTILITIES

1. From the Main Menu, click Utilities.
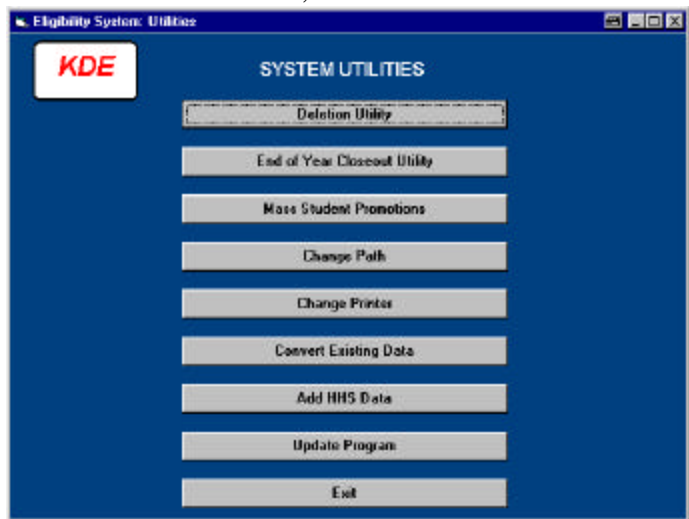


## DELETION UTILITY   ☒ SYSTEM NOTICE:  Deletions are Recoverable

The Deletion Utility allows administrators to easily delete student and parent records.  Once deleted, records can be restored. Restoring database can be done by clicking on the Restore Backup Database button. **This will restore your system back as it was before** <u>any deletions were made.</u>

**PLEASE NOTE:  This feature is not meant to take the place of your normal backup system procedures. It is very important that you make daily backups of this system when heavy system usage is going on. Once the heavy workload has decreased then do weekly backup of system.**
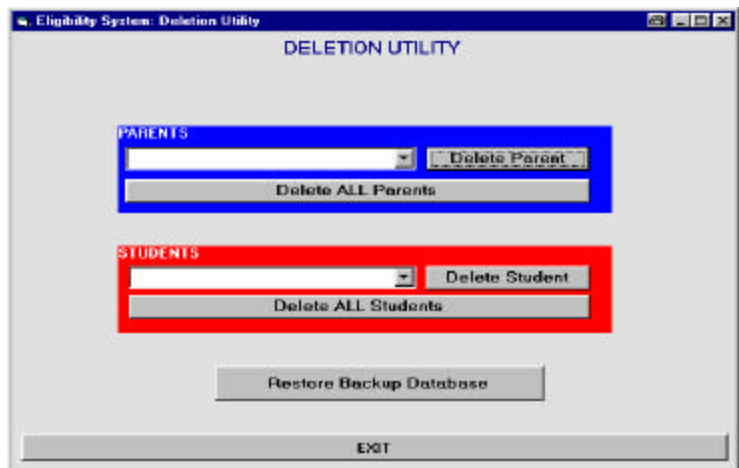


1. From the Utilities menu, click Deletion Utility.

2. Use the pull-down menus on the parent and/or student area to select an individual student or parent to delete.
3. Click Delete Parent or Delete Student buttons respectively.
4. When prompted with "Do you wish to delete this record?", click Yes at the Delete Confirm box.
5. When the deletion is complete, click OK.
6. Click Exit to return to the System Utilities menu.

☒ **SYSTEM WARNING:** Deleting ALL Parents or ALL Students may cause you to have to manually re-enter all records.  Once records have been deleted, you cannot re-convert your old data again.  You must delete the Eligibility System through the Add/Remove Software utility in your computer's Control Panel and re-install the system.  Data can only be converted into a new system.

# END-OF-YEAR CLOSEOUT UTILITY

Before beginning a new school year, you may choose either to enter all records into a new copy of this system (ALWAYS back up your old year files before beginning a new year - see backup instructions), or use the End-of-the-Year Closeout Utility to perform mass alterations updates to the old system to prepare it for the new school year.  For administrators who plan to carry over their student information from one school year to the next, it will be necessary to remove all process codes and creation dates from the student file to prepare for the new year. Removal of these codes will allow updating of eligibility status of each student for the next school year.

☒ **SYSTEM WARNING:   Student promotions are not recoverable!**
☒ **SYSTEM WARNING:  Be sure to remove graduating classes before doing any promotions.**
**Promote higher grades first to avoid mixing classes of students.  You cannot separate grades once they are combined.**

1.  From the Main Menu, click Utilities, then click End-of-Year Closeout Utility.
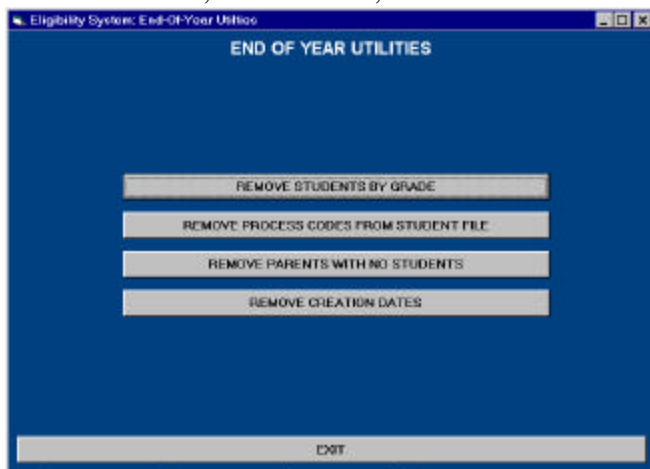


## Remove Students by Grade

This utility is usually used at the end of the school year to remove students who have graduated from the school system.  If your school goes to 12th grade, you can enter 12 and all students in grade 12 in the selected school will be deleted from the student file. This will make room for students who are moving up from grade 11 and being moved using the Mass Student Promotions utility. You should always delete the highest grade first before promoting a grade in its place (i.e., if you promote grade 11 before removing grade 12, the records will be mingled and can only be separated manually.

1.   From the the End-of-Year Closeout menu, click Remove Students by Grade.

2. Enter Grade number (05, 12, etc.) and the school's three-digit code number (001, 010, 159, etc.).
3. Click OK.
4. When prompted to perform the mass deletion, click Yes.

## Remove Process Codes

1. From the End-of-Year Closeout screen, click Remove Process Codes from Student File.
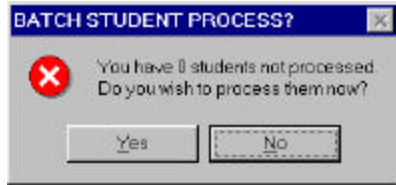


2. Click Yes.
3. When process codes have been updated, click OK.

## Remove Parents With No Students Attached

1. From the End-of-Year Closeout screen, click Remove Parents with No Students.
2. When prompted to perform a mass deletion, click Yes.

## Remove Creation Dates

1. From the End-of-Year Closeout screen, click Remove Creation Dates.
2. Click Remove Creation Dates.
3. Click OK to return to the End-of-Year Utilities menu.



When End-of-Year Closeout Utility functions are complete, click Exit to return to the System Utilities menu.

## MASS STUDENT PROMOTIONS

You may need to promote entire grades of students using the Mass Student Promotion utility.

1. From the Utilities menu, click Mass Student Promotions.
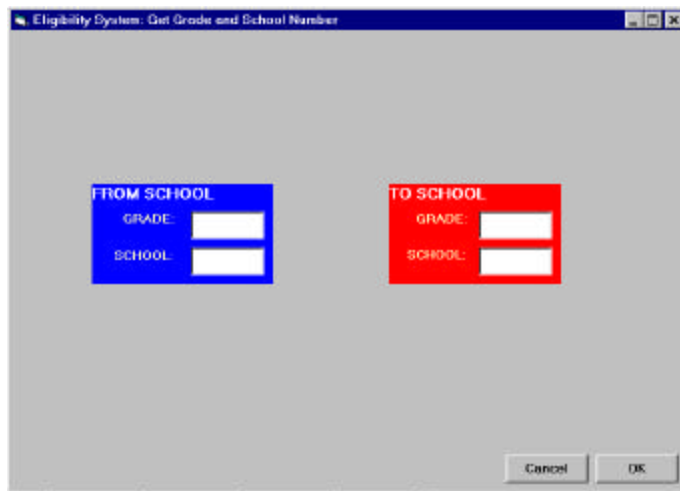
2. Click in the first field and enter school students are moving from (3-digit code number).
3. Enter grade students are to be promoted from (1-11).
4. Enter school students are to be promoted to (3-digit code number).
5. Enter grade students are to be promoted to (2-12).
6. Click OK.



7. In the Promotions Complete box, click OK.
8. Click Exit to return to the System Utilities menu.

## CHANGING DATA PATH/NETWORKING SYSTEM

This utility can be used if you need to move your Eligibility System database files to another location. After moving the files you will need to change the path to those files so that the application can find them. **NOTE**: Change path cannot be used with older version data and accessing data from a network drive may require additional permissions set by your network administrator.

1. From the Utilities menu, click Change Path.
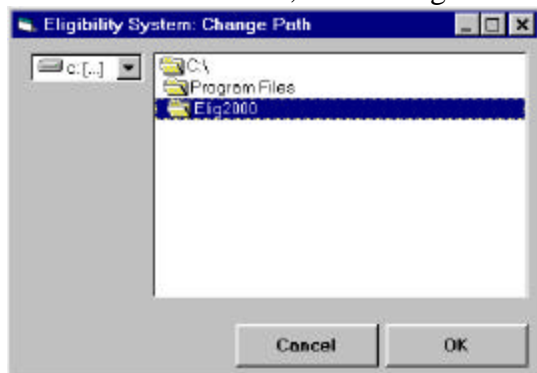


2. Use the pull-down menu to select the new drive location where the files are stored.
3. Double-click through the folder levels on the right to select the folder where the files are stored.

4. Click OK and you are returned to the System Utilities menu.

<span style="color:red">**NETWORK SYSTEM INTSTRUCTIONS**</span>

<span style="color:red">If you are going to use this system as a networked software program you must do the following:
Software installation must be made to a network drive setup with properly configured permissions allowing users full access to the volume and directory Eligibility system resides.
Once software has been installed to the network a shortcut icon must be made and placed on computers using the software. **Eligibility software is not to be installed on any client computers as unpredictable results can occur when using the system in this manner.**</span>

Network users:

**With this release all network users should be advised to run the program strictly from the version of the Eligibility System which is installed on your network server. A short cut should be made to the elig2000.exe, which resides on the network server. In addition all data paths should point to the directory containing the system on the network server. DO NOT USE THE SOFTWARE ON THE CLIENT MACHINES THIS WILL DISTORT SYSTEM POINTS AND PROVIDE YOU WITH AN UNSTABLE SYSTEM WITH UNPREDICABLE RESULTS**

# Program Update

In order for the updates to the Eligibility System to be complete, you will need to run the option UPDATE Program. This option can be found in the System Utilities. Once the program has been run it will apply all the updates contained in the new release of the software.

To perform new updates to the system, go to the **System Utilities** screen pictured below

Click on the new **Update Program** button (it is right above the **Exit** button) on the System Utilities screen:
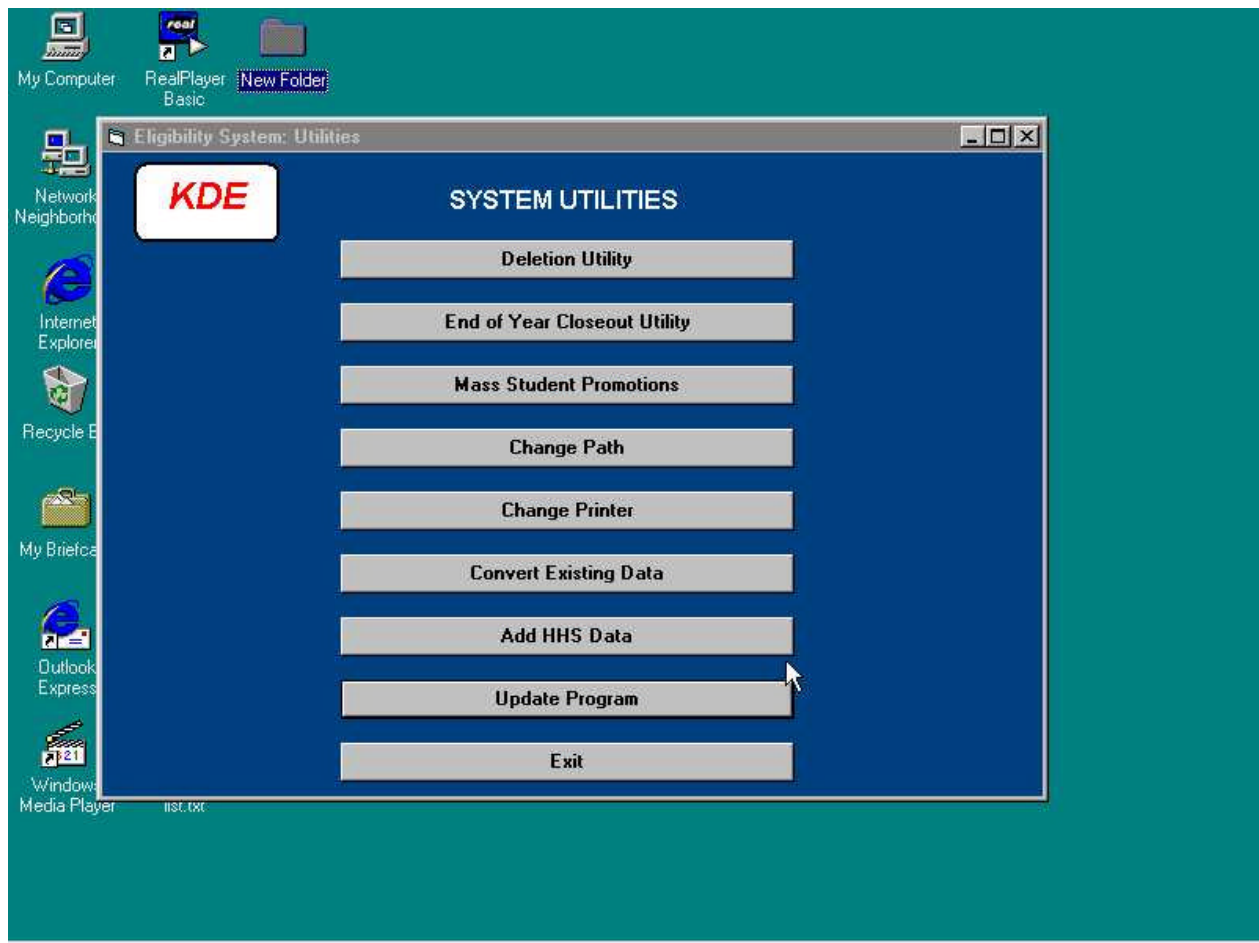
## Utilities Screen

After you click on the **Update Program** button, a navigation menu should appear that looks like the one pictured below.
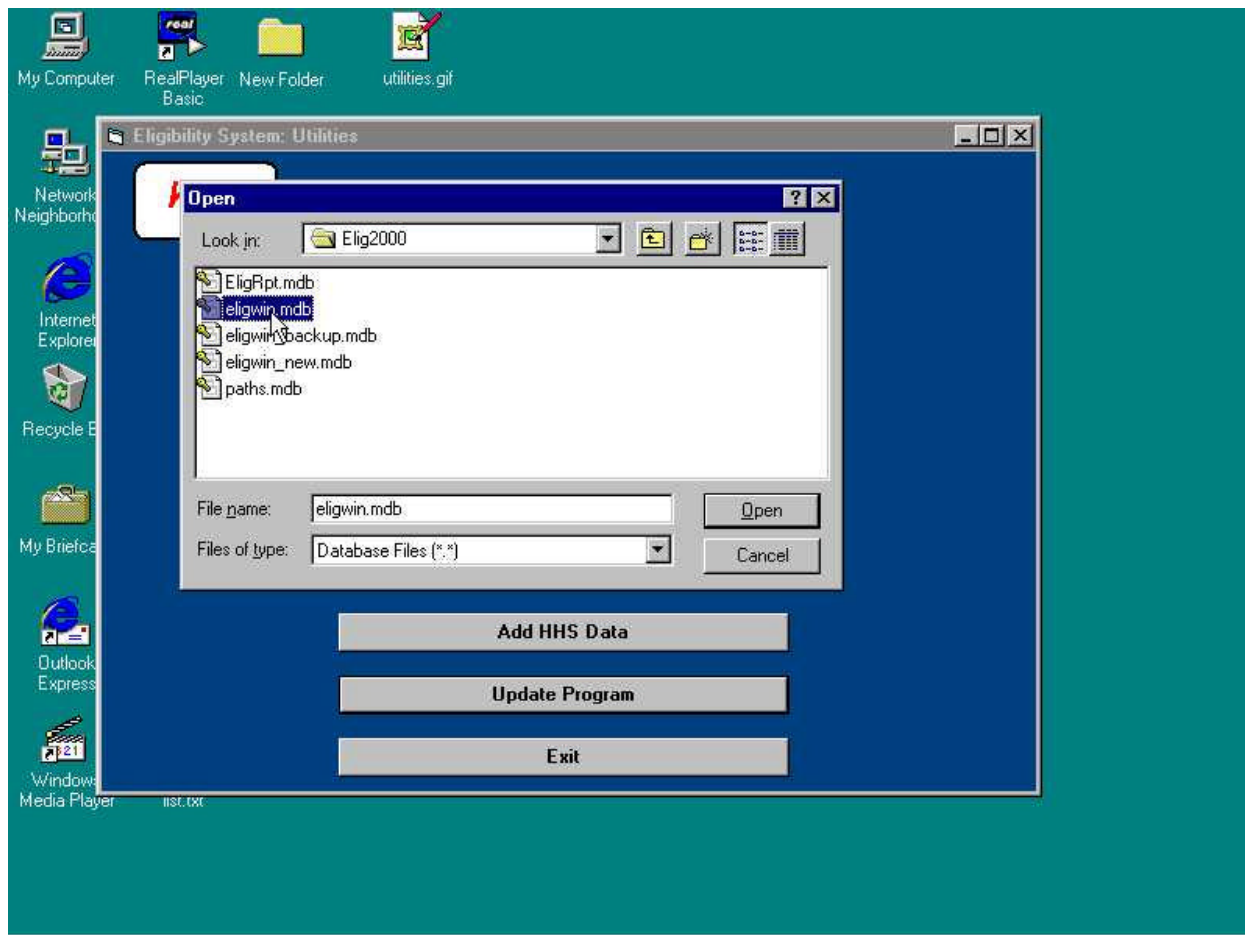
## Navigation Menu

**Double click on the Eligwin.mdb only**.  This will update your Eligibility program. The program will return you to the System Utilities menu automatically.

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## CHANGE PRINTER

This utility should be used if you need to change the printer to which your documents will be processed.

1. From the Utilities menu, click Change Printer.  **NOTE**:  The screen will look different depending on the printer you are using and its configurations.
2. Make any changes to your printer settings.
3. Click OK to return to the System Utilities menu.
4. When all System Utilities are complete, click Exit to return to the Main Menu.

## CONVERT EXISTING DATA

This command is detailed in the front of the manual and is used to convert data was entered into an older version of the Eligibility System prior to 1998.  You will not need this if you are using the updated system that was released over the last couple of years.

# DIRECT CERTIFICATION DATA

If you receive direct certification data using the Department of Health and Human Services diskette that is mailed to you each year, you can now import this data into the Eligibility System.

Direct certification data consists of two files provided by request to each school district and contains household information for families participating in the food stamp and/or K-CHIP program.

☒ **SYSTEM WARNING:  Direct certification data is received with the file names of FS.dat (food stamp information) and IM.dat (K-CHIP information) and must be RENAMED before the system will accept the imported data.  Copy these two files to your computer so that the original files are retained on the diskette, and on your computer copy, rename the FS.dat file FSDAT.TXT and rename the IM.dat file IMDAT.TXT.  It is not a good idea to rename the files on the original diskette copy**

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To load the direct certification data:

1. From the Utilities menu, click on the Add HSS Data button.  This will display a dialog box with a data path.
2. Make sure this path reflects the location of the FSDAT.TXT file you renamed on your computer or change the data path location to the location of the FSDAT.TXT file on your computer.
3. Click on the Add HSS Data button and the data will begin importing.  **NOTE:**  When the data has finished importing, you will be returned to the Utilities menu.  You will NOT receive a confirmation screen.  When you are returned to the Utilities menu, you may assume that the data is finished importing.
4. Return to the Utilities menu.
5. Click on the Add HSS Data button again.  This will display a dialog box with the data path.
6. Make sure this path reflects the location of the IMDAT.TXT file you renamed on your computer or change the data path location to the location of the IMDAT.TXT file on your computer.
7. Click on the Add HSS Data button and the data will begin importing.  **NOTE:**  When the data has finished importing, you will be returned to the Utilities menu.  You will NOT receive a confirmation screen.  When you are returned to the Utilities menu, you may assume that the data is finished importing.
8. After both data files have been imported, you MUST enter the correct Grade, School Number, and Homeroom for each student.
9. After all information is imported and all student information is correct on the Student screen, click Perform Calculation.

**NOTE:**  If these steps are not followed correctly, students will not appear properly on reports and will not bin included in the count of records.

# VERIFICATION

The Verification area allows you to select Focus or Random samples and generate Adverse Action Letters. Once a verification option is selected, the program will select the applications and produce a report of those selected. You may choose one of the following:

- **Selection of 1% Sample via FOCUS Method:** Selects 1% of approved free and reduced applications on file up to October 31. In addition, it selects ½ of 1% (.005) of those applications from food stamp households.
- **Selection of RANDOM Sample:** Selects 3% of approved free and reduced applications on file up to October 31. You may opt to select a higher percentage to verify.

1. From the Main Menu, click Verification.
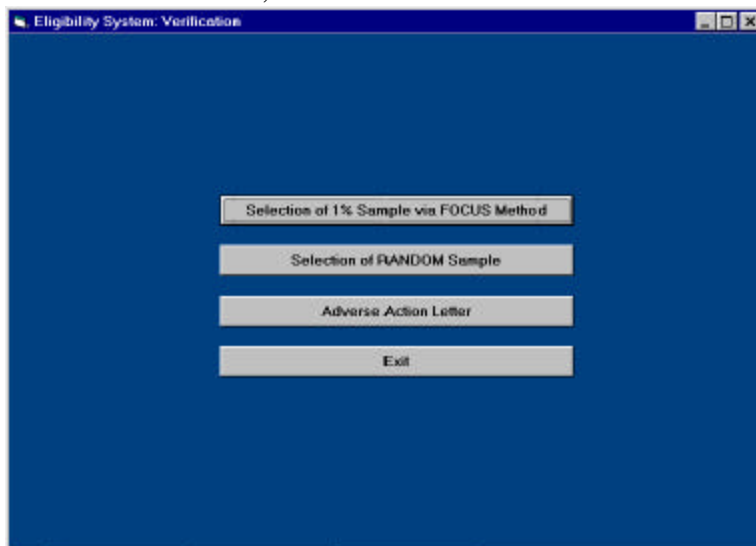


## Selection of 1% Sample via FOCUS Method

1. From the Verification menu, click Selection of 1% Sample via FOCUS Method. You cannot use the Cancel button while the report is generating records. This will cause an error and the application may shut down.
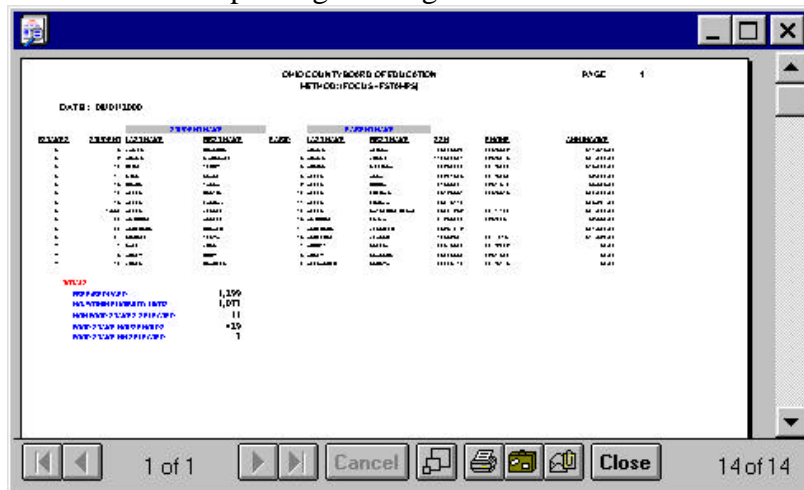
From the report screen, you can use the button bar at the bottom to:

⊞ View the report in full-screen mode.

🖨 Print a copy

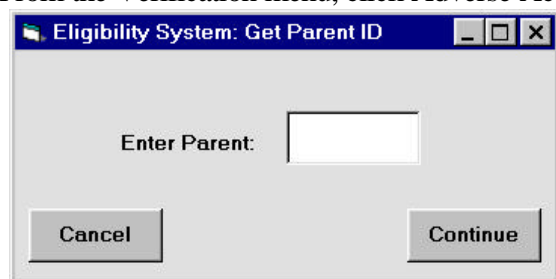💼 Use the Export Utility to save a file to disk.
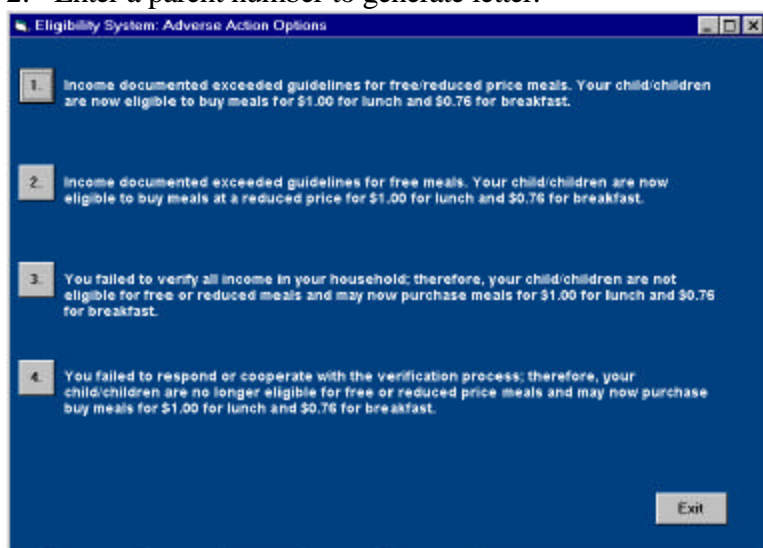
Close Close button to exit.

## Selection of Random Sample

1. From the Verification menu, click Selection of RANDOM Sample.



2. Enter percentage required for verification as a whole number (10, 15, 20, etc.).
3. Click Continue.



From the report screen, you can use the button bar at the bottom to:

⊞ View the report in full-screen mode.

🖨 Print a copy

💼 Use the Export Utility to save a file to disk.

Close Close button to exit.

## Adverse Action Letter

Adverse Action Letters notify families of benefits which are to be reduced or terminated due to the results of the verification process. Because students are tied to parent records, all students in household are automatically affected.

1. From the Verification menu, click Adverse Action Letter.



**Eligibility System: Get Parent ID**

Enter Parent: [____]

Cancel      Continue

2. Enter a parent number to generate letter.
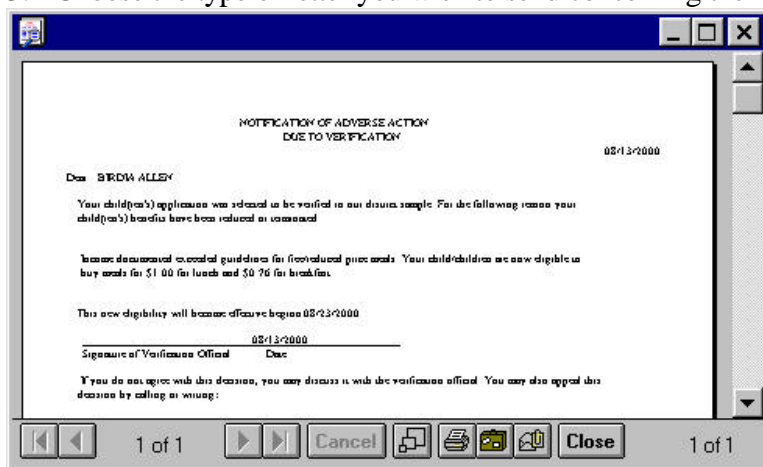


**Eligibility System: Adverse Action Options**

1. Income documented exceeded guidelines for free/reduced price meals. Your child/children are now eligible to buy meals for $1.00 for lunch and $0.76 for breakfast.

2. Income documented exceeded guidelines for free meals. Your child/children are now eligible to buy meals at a reduced price for $1.00 for lunch and $0.76 for breakfast.

3. You failed to verify all income in your household; therefore, your child/children are not eligible for free or reduced meals and may now purchase meals for $1.00 for lunch and $0.76 for breakfast.

4. You failed to respond or cooperate with the verification process; therefore, your child/children are no longer eligible for free or reduced price meals and may now purchase buy meals for $1.00 for lunch and $0.76 for breakfast.

Exit

3. Choose the type of letter you wish to send concerning the reason for Adverse Action.



1 of 1     Cancel     Close     1 of 1

4. Print the letter, then click the Close button and Exit to return to the Verification menu.
5. When all Adverse Action letters are complete, click Exit on the Verification menu to return to the Main Menu.

# LETTERS

Letters are generated automatically by the Eligibility System calculations according to Student/Parent Info and officials entered.

1. From the Main Menu, click Letters and select the Special Options you require for your letters (see list below).
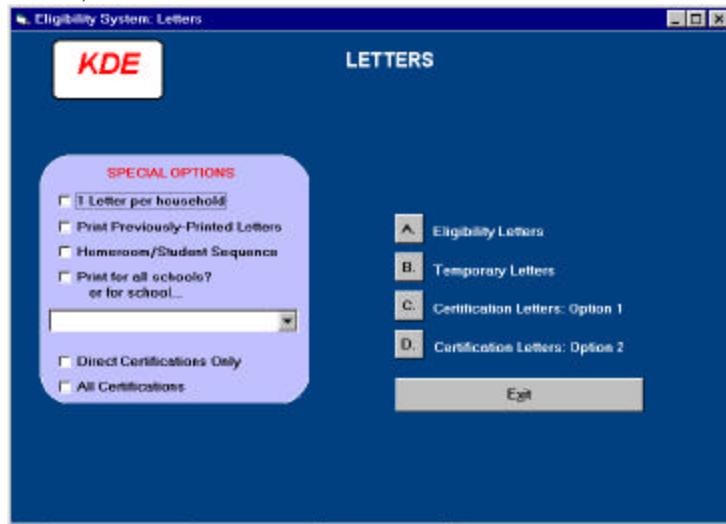


## Letter Types

**Approved Free:**  Notification to parents that student is approved for free meals. Places student's name on letter along with name of the determining official in letter.

**Approved Reduced:**  Notification to parents that student is approved for reduced-price meals. Places student's name, reduced prices for lunch and breakfast, and name of determining official in letter.

**Denied:**  Notification to parents that student has not been approved for free or reduced price meals because of income reported or error on application. Notifies parent of right to appeal to the Determining Official, Appeal Official's name and address.

## Special Options

- **1 Letter Per Household:**  Click this check box to generate 1 letter per household.
- **Print Previously Printed Letters:**  To print letter that have already been processed. **NOTE**:  Once letters have been processed, you must check this box to reprint letters that have already run.
- **Homeroom/Student Sequence:**  Letters print in Homeroom/Student sequence.
- **Print letters for all schools or for a specific school:**  Clicking the check box will print letters for all schools or your can choose one school by using the pull-down menu to select a school to generate letters for.
- **Direct Certification Only:**  Click here to generate Direct Certification letters only.
- **All Certifications:**  Click this check box to print all certifications. If you want to print previously processed letters, you must check the Print Previously Printed Letters check box.

From the report screen, you can use the button bar at the bottom to:

View the report in full-screen mode.

Print a copy

Use the Export Utility to save a file to disk.

Close button to exit.

⊠ **SYSTEM WARNING:  After the first time you run a series of letters, you must always choose Print Previously Printed Letters**

# Eligibility Letters

1. After you have selected your Special Options preferences, click the Eligibility Letters button.



# Temporary Letters

Temporary letters are generated to families who have a temporary status before verification is complete.

1. Select any Special Options required.  If you have already processed the Eligibility Letters, you may have to click Print Previously Printed Letters.

# Certification Letters:  Option 1 and Option 2

Certification letters are generated to notify families of direct certification automatic eligibility. Option 1 letters may be generated to require no action by parents or may require parents to grant a waiver of confidentiality granting the school system rights to allow students to have other benefits based on information provided for the Child Nutrition Programs, and Option 2 requires parents to sign a waiver if they want to receive benefits.

1.  Select any required Special Options from the right-hand side of the Letters screen and ensure that Print Previously Printed Letters is selected.
2.  Click the C or D button depending on the option letter you require.

When you finish processing all your letters, click Exit to return to the Main Menu.

# REPORTS

## Navigation:

From the report screen, you can use the button bar at the bottom to:

🗗 View the report in full-screen mode.

🖨 Print a copy

📷 Use the Export Utility to save a file to disk.

Close  Close button to exit.

**Printing Requirements:** This system can use any type Dot Matrix/Laser printer.  It is recommended that a high capacity printer be used because of the volume of printing that will be done. The system can print all **reports** using standard 8 ½  x 14 or 14 7/8 x 11 ¾ continuous paper.  **Letters** are printed using standard 8 ½ x 11 or 9 ¾ x 11 ¾.

1.  From the Main Menu, click Reports.
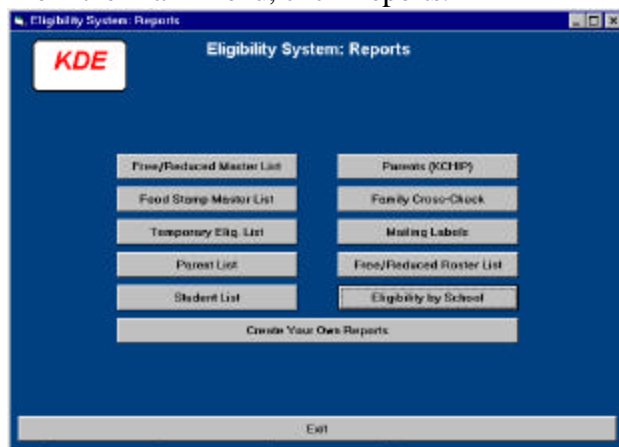


## FREE/REDUCED MASTERLIST

This report generates a free and reduced price master list of students identifying them by eligibility.

1.  From Reports, click Free/Reduced Master List.

# FOOD STAMP MASTERLIST

This report generates a food stamp master list of households claiming food stamp eligibility.

1. From Reports, click Food Stamp Master List.
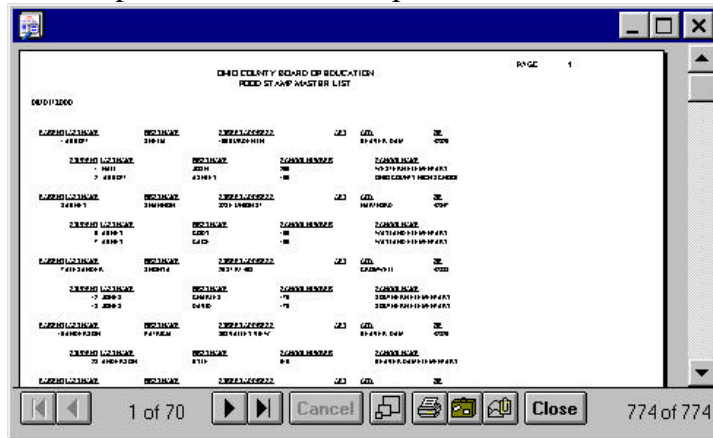


# TEMPORARY ELIG. LIST

This report generates a list of students approved temporary and their eligibility status.

1. From Reports, click Temporary Elig. List.



2. Click a check box identifying how you want the data sorted (Last Name, Parent ID, Student ID, Eligibility or School.
3. Click OK.
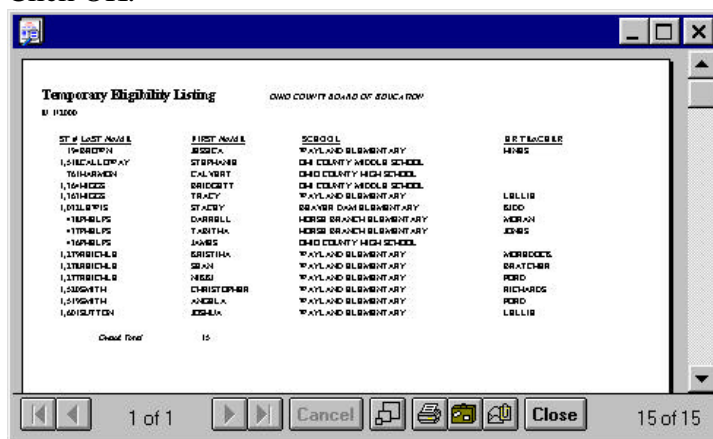
# PARENT LIST

This report generates a list of parents in the district

1. From Reports, click Parent List.



2. Click a check box identifying how you want the data sorted (Last Name, Parent ID, Student ID, Eligibility or School.
3. Click OK.



# STUDENT LIST

1. From Reports, click Student List.



2. Click a check box identifying how you want the data sorted (Last Name, Parent ID, Student ID, Eligibility or School.
3. Click OK.

# PARENTS (KCHIP)

1. From Reports, click Parents.



# FAMILY CROSS-CHECK

This report generates family data, listing students in subheadings under the parent record.

1. From Reports, click Family Cross-Check.



# MAILING LABELS

This report generates mailing labels from the parent list. Label size is 3 ½ x 1.

1. From Reports, click Mailing Labels.
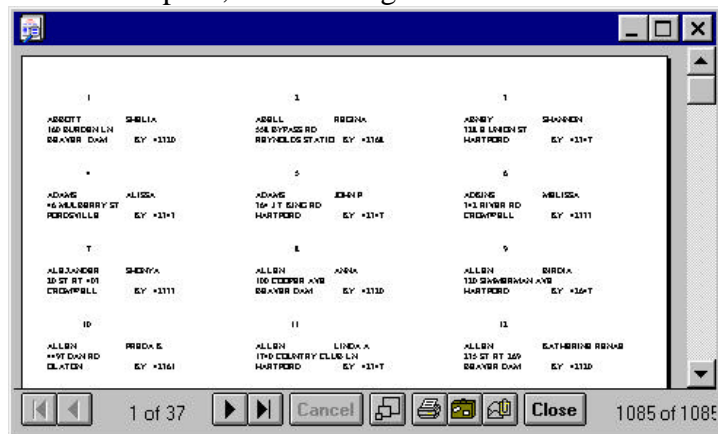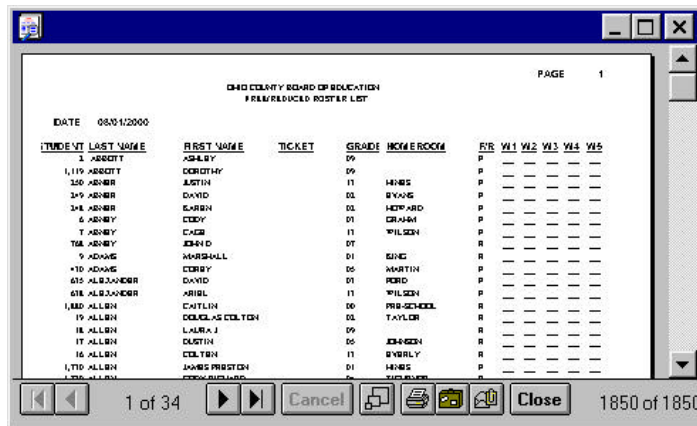
# FREE/REDUCED ROSTER LIST

This report generates a list of Free and Reduced price students by homeroom.

1. From Reports, click Free/Reduced Roster List.



2. Click a check box identifying how you want the data sorted (Last Name, Parent ID, Student ID, Eligibility or School.
3. Click OK.



# ELIGIBILITY BY SCHOOL

This report displays a total number of free, reduced, denied and temporary students by school.

1. From Reports, click Eligibility by School

# CREATE YOUR OWN REPORTS

You may choose to build your own report with the eligibility data.

1. From the Reports menu, click Build Reports.



2. Click on each title in the left menu that you want to appear in the report. The selected titles will appear in your report request in the right menu in the order in which they are selected. (To remove an item from the report, click on it in the right menu and it will be removed from the report.)
3. If you want to include ALL RECORDS in the report, leave the Selection Criteria fields blank. If you want to run a more specific report, continue to step 4. NOTE: Leaving Selection Criteria fields blank captures all records.
4. In the Selection Criteria area, use the School pull-down menu to select a 3-digit school number (leave blank t capture all schools).
5. Use the Food Stamps pull-down menu to select Yes or No for inclusion of food stamp households (leave blank to capture both Food Stamp and non-Food Stamp recipients).
6. Use the Eligibility pull-down menu to select the type of eligible students you want to include in your report or select ALL from the list.
7. If you want to include only families that have a K-TAP number, click the K-TAP Number present check box.
8. After you have made all of your selections, click the RUN button. Your report is generated and displayed.

# BACKUP

It is recommended that you make regular backups of your data files.  By default, these files are located in the Program Folder on the C:\ drive, in a folder titled Elig2000.  At a minimum, you should back up three files:

1. eligwin.mdb

2. paths.mdb

3. EligRpt.mdb

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# EXITING THE SYSTEM

When you are ready to exit the Eligibility System, click on the Exit buttons on each screen until you return to the Main Menu.  At the Main Menu, click the Exit button to close the Application.
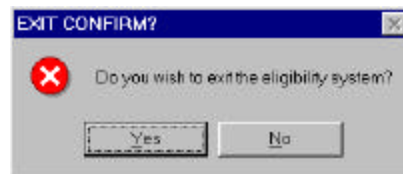


When prompted to exit, click Yes.  If you have unprocessed records, you will be prompted to process them.